

RFQ 198 - Aged Care Services Review - Assessment Matrix

| PROVIDER | TOTAL | RANK | Comments |
|------------------------------|-------|------|---|
| Watershed Solutions | | | Concerns regarding the proposed methodology, wanting to run an EOI within the scope. Appears to be entirely focussed on a "outsource" mentality Looking for lots of Shire time and development of discussion papers rather than conducting independent review |
| Weighted Scores | 29.75 | 2 | |
| KPMG | | | Good understanding of requirements of scope and brief Probably the best methodology, expertise and experience based on availability of total resources. Most expensive but brings a sound background, solid support and other future options to the table. |
| Weighted Scores | 28.75 | 4 | |
| Ansell Consulting | | | Principal partner (Cam Ansell) detailed experience, skills and knowledge specific to requested service to be delivered to the Shire. Support resources/ personnel have required expertise and experience. Most directly relevant experience in delivering similar reviews for other local governments, not for profits and corporate sector. Most competitive pricing structure. |
| Weighted Scores | 30.50 | 1 | |
| Beacon Strategies | | | Very focused on PHN work and east coast based organisation No specific comparative aged care modelling noted. No outsourcing management advice noticed. |
| Weighted Scores | 20.00 | 7 | |
| Turner & Townsend Consulting | | | Very sound detailed methodology that targets specific scoped topics Only organisation to even mention cemeteries Overall experience is high but specific team member experience and relevance to project is questionable. |
| Weighted Scores | 25.25 | 5 | |
| Fortis Consulting | | | Overall experience in Aged Care Review is somewhat limited Project Plan details areas of research that I would expect the consultants to already be aware of. Doesn't appear to be any previous collaborative work between the two groups. |
| Weighted Scores | 29.25 | 3 | |
| Verso Consulting | | | Lacks financial expertise Limited resources Unknown travel/expense costs travelling from eastern states. |
| Weighted Scores | 23.75 | 6 | |

Key:

ALL CATEGORIES SCORED OUT OF 10

PRICE SCORED IN REDUCING INCREMENTS OF 10,000 (IE: 100,000 = 1 = 10,000=10)

Shire of Donnybrook Balingup

RFQ 198 – Aged Care Services Review

Prepared By: Anna Bonython
For Watershed Solutions
(Previously Trading as Bonython Consulting)

81 Central Avenue
Mount Lawley WA 6050

24th September 2018



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Shire of Donnybrook Balingup RFQ 198 – Aged Care Services Review

1. EXECUTIVE SUMMARY

From the project brief, it is clear that the Shire of Donnybrook Balingup are committed to taking an informed and considered approach to how the full range of aged care services can best be delivered, by having a comprehensive understanding of the communities aged care needs and aspirations, relative to the changing legislative environment that continues to evolve. It is understood that review findings will underpin decision making regarding not just the provision of aged care services, but also how to best support and enable positive aging with relation to:

- Standards of care and legislative compliance;
- Infrastructure needs;
- Service delivery; and
- Advocacy for increased services or new services.

The brief recognises that LGAs have a much broader role in the provision of services than has previously been the case. Local Government now has a key role to play in providing the representative interface for the communities within their boundaries with state and national funding bodies and service providers. It is understood that the aim of the brief will also provide the Shire of Donnybrook Balingup with solid base line data and information to better understand the factors impacting on positive ageing.

The brief clearly reflects local governments' role of advocating on behalf of; and enabling the communities within its boundaries to have equitable access to services. This commitment then translates to the ability of attracting additional resources to support & promote more liveable and vibrant communities; that in turn underpins someone's decision to live in a particular locality.

On completion, Watershed Solution's aim is to provide the Shire of Donnybrook Balingup with relevant information to plan for the future; advocate on behalf of the resident populations for additional or new services / funding; along with assisting to develop a robust framework to support positive ageing at all levels. The Shire of Donnybrook Balingup will also have base line data that will enable the council to monitor the growth or decline in C/W or State funded services in the future

Ultimately, the aim will be to provide the Shire of Donnybrook Balingup with a comprehensive understanding of the communities and services that comprise the Shire of Donnybrook Balingup LGA to enable current and future council administration to adapt to the changing nature of aged care needs in the future, as well as providing solid information to present the compelling argument for addition resources, whether it be human, financial or physical.

The Merits of Watershed Solutions' proposal include

- Watershed Solutions' team has a diversity of skills and experience relevant to the project brief including operational health & aged care experience specific rural & remote areas; a depth of research capabilities, including a team member whose honours thesis focused on innovative models in aged care; and team member with considerable experience in commerce, cost benefit analysis and legislative compliance.
- Principle Consultant Anna Bonython has always been passionate about ensuring rural communities retain services, relative to the metropolitan area, and has a record of achievement in developing and implementing innovative models of service delivery in rural/remote areas that have been sustainable in the long term

2. OVERVIEW OF WATERSHED SOLUTIONS

Watershed Solutions (previously trading as Bonython Consulting) is a boutique consulting firm specialising in rural / remote service delivery planning & development that evolved out of a consequence of circumstances. After giving up her career as a senior manager in WA Health to move to the Kimberley to establish a marine based tourism business, principal consultant Anna Bonython missed the intellectual stimulation of her management career and the sense of satisfaction obtain from working with and assisting rural communities to overcome the challenges of having equitable access to services. To overcome this professional gap, Anna started Bonython Consulting in June 2000.

Since 2000 Anna has worked across a number of different industry groupings from health and aged care to small business, local government, not-for-profit, and Aboriginal Community Controlled Organisations.

The Watershed Solutions Approach

At Watershed Solutions, we feel strongly about rural communities and strongly believe rural communities must be supported and invested in. As a local government authority, we know your organisation can create an influential impact across your communities. Watersheds Solutions' philosophy is to assist you in that role, because we're specialists in social – community – service planning with the added benefit of a unique rural background and expertise that translates to a better understanding of the downstream consequences.

To us, community development is about capturing the goals and aspirations of a group of people and partnering with them to create a plan that will turn those goals into tangible outcomes that will benefit the community as a whole. It's about empowerment, as well as developing and transferring skills back to them so they can build a foundation that will continue to grow.

Having worked in a range of industries and sectors, Watershed Solutions work with your team to create strategies and solutions that will empower both your organisation and your community. From our lead researchers to our virtual assistants, the Watershed team's aim is to help the Shire of Donnybrook Balingup make the most profound impact on your communities by ensuring what we do is relevant to the local environment and sustainable in the long-term.

At Watershed, we combine our aptitude for analytical thinking with our ability to see the bigger picture and use these talents to break your project down into workable steps. Our eye is always on your desired outcome, but our process is about getting you from one point to the next.

Understanding your industry helps, however, ultimately our strength lies in our ability to visualise the end result and break it down into logical steps to ensure you achieve that result.

With service delivery planning, part of the process involves foreseeing what obstacles you might encounter along the road, such as the ageing population, advances in technology, or changes to legislation. There's not much point planning towards one set of goals when your organisation could be blindsided by a change in the operating environment. Our aim is to help you to avoid these potential minefields.

The process of planning is also about transferring information from one party to another, whether it's from a local government to their community members, or with external service providers/funders. We help you to communicate what the obstacles, issues or challenges might be, as well as finding a way to address those problems.

Ultimately, it's about bringing people along with you, and that's where Watershed has proven to be very effective.

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3. METHODOLOGY

The following provides an outline of the proposed methodology to complete the scope of work, which is only indicative as the methodology may need to be adapted / adjusted in response to project or stakeholder needs.

- 1) Meet with key personnel from the Shire of Donnybrook Balingup and the Aged Care Services Community Reference Group to gain an insight into local challenges and community perceptions regarding the provision of aged care services; and make any adjustments to the scope of work as deemed necessary
- 2) Establish a robust stakeholder / community engagement strategy to ensure the wider community is kept informed of progress and the reasons behind the work being undertaken. This may need to include public meeting/s, newsletters, articles in the print media, and radio interviews
- 3) SWOT analysis and review aged care services currently provided by the Shire.
- 4) Profile the communities that comprise the Shire of Donnybrook Balingup LGA. This step is designed to create an understanding of the resident population based on the factors that influence an individual or community being able to achieve their full potential.
- 5) Assess current and projected demand for aged care services based on projected population growth in the 55+ age cohort relative Commonwealth aged care service delivery ratios.
- 6) Discuss with the Aged Care Services Community Reference Group the merits of obtaining Expressions of Interest from alternative service providers.

NB: This step is being proposed so that the potential down side risks and benefits can be assessed as part of the review process. Subject to this step being endorsed a robust communication strategy with the community will be paramount to mitigate any concerns in the community about what this action really means.

- 7) Subject to step 5 being endorsed, then an 'Expression of Interest' brief would be prepared for interested providers to respond to. Once responses had been received an evaluation of the submissions received would be compiled with a written report prepared for the Aged Care Services Community Reference Group for consideration
- 8) Throughout the course of the project a series of discussion papers will be prepared on relevant topics to canvas different ideas / models to generate discussion amongst key stakeholders and provide a progressive body of knowledge for future reference. These documents will help shape the agenda for meetings with the Aged Care Community Reference Group. Topics envisaged include (but not limited to)
 - Demographic profile of the resident population and projected changes to population demographics
 - Assessment of existing/future demand for Commonwealth funded aged care services
 - Impact of (known) Legislative changes to aged care
 - Findings from research into alternative models of service delivery
 - Assessment of risks & benefits of alternative models/providers
- 9) Prepare a draft report that captures the findings of the review
- 10) Present draft report to the Aged Care Services Community Reference Group and Shire of Donnybrook Balingup Council members for feedback and comment prior to presenting findings to the community via a public meeting
- 11) Finalise the review findings, taking into account feedback from step 10 above and submit final report
- 12) Based on findings from the review, prepare a draft Positive Ageing Strategy for consideration and adaptation. This document is design to underpin the shift towards 'active ageing' which recognises and supports the desires of older people to continue to work, socialise, participate, contribute and engaged with the community as they age.

4. QUALITATIVE SELECTION CRITERIA

4.1 Previous Experience with Similar Projects

The following examples are provided to reflect relevant experience the Watershed Solutions team has had with similar project briefs. Examples provided are work that was undertaken when the business traded as Bonython Consulting and prior to the business being renamed Watershed Solutions.

1. Amaroo Retirement Village – Baldivis Demographic Study

Engaged by Amaroo Retirement Village to assess the potential demand for aged care services in the Baldivis area to determine whether it would be viable to expand Amaroo's service delivery beyond the Gosnells / Armidale metropolitan area. The scope of work entailed assessing the projected population increase in the 55yrs and older cohort over the next 10 to 15 years for the suburb of Baldivis and then assess the need for aged care services in accordance with the Commonwealth planning ratios for aged care services relative to the existing level of services currently being funded by the Commonwealth.

2. Amaroo Retirement Village - Strategic Marketing Plan

Contracted to undertake the necessary research to support the development of their strategic plan and then to prepare a strategic marketing plan. The primary focus of this assignment was to assist Amaroo manage their marketing effort by:

- Undertaking an analysis of markets and the marketing environment;
- In consultation with relevant personnel, plan marketing strategies and programs to take advantage of market opportunities;
- Developing frameworks to support the implementation of these strategies and programs; and
- Providing recommendations on mechanisms to control the marketing effort to ensure that Amaroo operates efficiently and effectively.

A core component of this assignment was the environmental scanning and situational analysis process, as both the aged care and retirement village providers are finding themselves at the crossroads, facing a number of significant challenges. Both industries have the opportunity to plan now to 'act' on the demographic transition that is taking place with the aging of the 'baby boomer' generation, rather than 'react' in a decade's time and forgo the gains.

3. Amaroo Retirement Village - Business Development – Amaroo Management Services

Undertook the necessary scope of work to explore the potential benefits & risks of establishing a commercial business venture to allow Amaroo to leverage their industry expertise in the retirement and aged care industry on a commercial fee for service basis. The scope of work included:

- Drafting Terms of Reference for the governing body.
- Providing background information on corporate liabilities and potential for litigation of the parent company.
- Undertaking research to ensure the commercial venture does not affect Amaroo Village's taxation position including 'Public Benevolent Institution' and FBT exempt status.
- Preparing due diligence frameworks for assessing business risk of potential clients.

4. Boab Health Medicare Local Service Delivery Model Development & Tender Submission

Engaged by Boab Health to prepare their tender to the Commonwealth to be a Medicare Local Provider for the Kimberley & Pilbara regions. Under the Medicare Local funding model, all primary care funding would be allocated to one service provider for a defined geographical region. The consequences of this new funding model meant that individual agencies like for example Aboriginal Health Services, Divisions of General Practice and other autonomous primary care providers would no longer receive their funding direct from the Commonwealth. Instead, these agencies would be required to compete against other service delivery providers to obtain funding to deliver specific services and would no longer receive funding for administration.

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The notion of no longer having ongoing recurrent funding was a significant organizational threat to all of the autonomous Kimberley & Pilbara based primary care providers. However, despite having 12 months to prepare for the new funding arrangements very little preparatory work had been undertaken to transition the independently funded agencies to a competitive service delivery funding model.

Before the tender could be compiled it was necessary to undertake a consultative process with all the commonwealth funded primary care providers in the Kimberley & Pilbara Regions to develop a model of service delivery that was equitable and sustainable, whilst at the same time meeting the tender documents service delivery criteria.

With only 8 weeks before the tender closed, I was engaged to assist the working group comprising representatives from the various independent agencies to oversee the development of an appropriate model that would be acceptable to all parties.

Due to the size of the Pilbara & Kimberley regions it was not possible to have face to face meetings and time constraints meant that it was imperative that the process was efficient in terms of information dissemination and discussion surrounding possible models of governance and service delivery. To achieve this, the following documents were prepared:-

- Issues papers designed to canvas input into the various elements the preferred model would have to address to be considered as a viable provider under the Commonwealth's tendering process and be endorsed by the established primary care providers.
- Discussion Papers to clarifying various aspects of the proposed models of service delivery
- Project Updates
- Change management strategy
- Draft governance & operational documents, including
 - Governing Body Skills Matrix
 - Heads of Agreement
 - Partnership Agreement
 - Consumer Advisory Committee Terms of Reference

The final outcome was a successful tender submission, where after 3 years (and a change of government at the federal level), the Medicare Local funding model developed in the Kimberley / Pilbara became the model that was subsequently adopted by the Commonwealth Dept of Health & Aged Care in 2014 and implemented nationally.

5. Derby West Kimberley Health Service Delivery

Engaged by the Shire of Derby West Kimberley to prepare a Health Service delivery plan for the Shire of Derby West Kimberley. The scope of work entailed:

- Profiling the communities that comprised the Shire of Derby West Kimberley LGA in terms of aged, social disadvantage, home and vehicle ownership; health status; and other factors that influence a given geographical areas ability to achieve their full potential compared with state & national data.
- Consult with service providers to obtain information on services provided; staffing ratios; obstacles to delivering these services and any other factors that impacted on the delivery of services. This part of the process enabled Bonython Consulting to collate base line data that would allow the council to monitor declines or increases in service delivery relative to its populations into the future.
- Facilitate a number of community workshops in Derby, Fitzroy Crossing and communities up the Gibb River road to gain an insight into their perceptions of health services provided.
- Facilitate a workshop with key personnel regarding the future of health service delivery in the LGA.

In addition to the challenges mentioned above, one of the major challenges in this assignment was getting access to relevant statistical data from the State Health Department to be able to make meaningful comparisons against other areas to demonstrate issues of under servicing or where because of the social disadvantage in the LGA service provision was not accessible.

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6. Burra Clare Snowtown Health Service – Regional Health Service model of service delivery

Contracted by the Burra Clare Snowtown Health Services to undertake the necessary planning and community consultation process necessary to underpin the transition to a regional health service (RHS) model

The communities of Burra, Clare & Snowtown are situated in the lower mid north region of South Australia. In addition to the three towns listed above, the service delivery area comprised some 24 smaller towns and sidings with populations ranging from 180 to 4000.

In completing this assignment, I was required to undertake the following:-

- Develop a profile of the health services available in the service delivery area
 - Profile the towns and smaller communities in the catchment area
 - Health needs analysis using
 - morbidity and mortality data
 - usage patterns and leakage rates
 - socio-demographic data
 - normative need based on input from resident health care professionals
 - felt need based on views of the resident population
- Undertake community consultation designed to
 - explain the RHS concept
 - obtain consumer input into the needs analysis
 - gain the communities support for moving towards the RHS model of service delivery
- Develop a model of service delivery relevant to the Burra Clare Snowtown geographical area, taking into consideration the following key factors:-
 - The geographic makeup of the service delivery area, both in terms of the main centre of Clare, the sub centres of Burra, Snowtown, Riverton and Balaklava and the outlying small communities of the sub region that rely heavily on the towns of Burra, Clare, Snowtown, Riverton and Balaklava for access to services.
 - The existing resources and infrastructure available to the Burra Clare Snowtown Health Service and associated service providers
 - The time health workers spend travelling from the main service centre to deliver services in the outlying communities.
 - The significance of community development and the impact these initiatives have on the health status of the resident population
 - Opportunities to strengthen partnerships with other agencies and service providers
 - Identify specific service needs and develop activities and performance indicators for each proposed new service
 - Develop indicative budget estimates for proposed new services

7. Central Great Southern Health Service Multi Purpose Service

The Multi Purpose Service (MPS) funding model was a combined Commonwealth & State Government initiative that entailed the 'cashing out' of both commonwealth & state funding for a defined rural geographical area to deliver integrated acute, primary and aged care services to the resident population.

The MPS funding was in response to service delivery constraints in rural & remote areas where, whilst they had the same service delivery needs as people in larger rural centres or the metropolitan area, they lacked the population base to support conventional service delivery models that required economies of scale to be viable. By 'cashing out' the funding like for example aged care beds, a small rural community under the MPS model could receive the funding for 5 or 6 aged care beds which could then be delivered locally without the need for a dedicated aged care facility.

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Within the Central Great Southern geographical area there were numerous Commonwealth funded primary and aged care providers who all had their own governance and management structures. In addition to this the 3 acute care hospitals and 1 nursing post all had their own community elected Boards of Management.

Whilst employed as the General Manager of the Central Great Southern Health Service Anna was responsible for progressing the development of a 'multi sided' multipurpose service to a point where all seven LGAs in the district agreed to proceed as a district MPS. At the time, this was to be the largest MPS nationally. The process to establish the Central Great Southern MPS involved:-

- Needs based service delivery planning;
- Infrastructure and human resource planning; and
- Extensive consultation with all stakeholders.

The process involved a number of complex issues including ownership of assets, governance issues, staffing, funding sources and allocations to individual service providers, reporting and accountability.

To be approved by both the Commonwealth & State funding bodies the 4 Boards of Management and the autonomous Commonwealth funded primary care providers had to agree to become an MPS. The parochialism between the neighbouring communities of Katanning & Kojonup was significant so getting them to co-operate and work together for the benefit of the entire district was a major challenge. Likewise the vested interests of the resident general practitioners; and the reservations held by autonomous primary care providers opposing the model out of concern that primary care funding would be absorbed into propping up the acute hospitals were also major hurdles to overcome.

After 18 months of negotiation, consensus was finally reached to establish a District Governing model so that an application could be made to become a district MPS which was subsequently approved by the Commonwealth & State funding bodies.

The Central Great Southern MPS was the first multi sided MPS nationally and the process and model of governance developed in the Central Great Southern became the framework that other rural communities around Australia adopted to become an MPS.

5. PROJECT TEAM

Anna Bonython – Principal Consultant & Project Management

Watershed Solutions' Principal Consultant, Anna Bonython, has a wealth of experience working across strategic and operational initiatives particularly in rural and remote areas. For nearly two decades, Anna has worked across a diverse range of industry groups including:

- Local Government
- Not-For-Profit Agencies
- Health and Aged Care
- Small Business
- and Aboriginal Community Controlled Organisations

Anna is an experienced manager and consultant with 10 years working as a senior manager in the public & not for profit sectors, and a further 16 years working as an independent consultant. Anna holds a degree in health management and has had extensive experience working across the 3 levels of government and the community in the mapping and service delivery profiling for defined geographical areas.

Since establishing her consulting business in 2000 (previously trading as Bonython Consulting), Anna has been engaged to undertake a number of C/W and State funded service delivery planning studies including Burra, Clare & Snowtown in South Australia, the Kimberley Sexual Abuse / Sexual Assault Counselling Service; and the Wyndham MPS which are in addition to the examples given above.

Wendy Fleet – Associate Consultant

Wendy holds a Bachelor in Commerce, a Graduate Certificate in Tertiary Education and a Masters in Education and has had extensive experience working across multiple aspects of commerce, specifically in education, legislative compliance; accreditation and cost benefit analysis.

Wendy will be responsible for assessing the legislative compliance aspects of the project brief; providing input into the EOF document of alternative providers and assessment of respondents information, including cost benefit analysis.

Nick Petrie – Research Assistant

Nick is an Honours graduate in Sociology from the University of Tasmania and has extensive research experience. His research expertise to date has focused on the aged care industry. His published research as part of his Honours thesis focused on providing innovative recommendations and solutions for the aged care sector to better cater for the needs of people who identify as Lesbian, Gay, Bisexual, Transgender and Intersex (LGBTI).

Nick will be tasked with undertaking the desk top research associated with the brief including profiling the communities within the LGA and undertaking further research on innovative models of aged care.

5.1 Availability

Section 6 provides an indication of the proposed timeframes for each of the deliverables that have been identified. The following is an indication of when each of the listed Watershed team members would be available to start work on the scope of work.

- Principal consultant Anna Bonython would be available within 3 weeks of being notified to meet with Shire of Donnybrook Balingup personnel and the Aged Care Services Community Reference Group to discuss / refine the proposed methodology.
- Research Assistant Nick Petrie is available to start work immediately on researching alternative models of service delivery and demographic profiling immediately
- Wendy Fleet is available to commence her role once the methodology has been ratified by the Aged Care Services Community Reference Group.

6. TIMEFRAME FOR DELIVERABLES

| Task No | Deliverable | 08/10/18 | 15/10/18 | 22/10/18 | 29/10/18 | 12/11/18 | 26/11/18 | 3/12/18 | 17/12/18 | 24/12/18 | 7/1/19 | 14/1/19 | 21/1/19 | 28/1/19 | 4/2/19 | 11/2/19 | 18/2/19 | 25/2/19 |
|---------|--|----------|----------|----------|----------|----------|----------|---------|----------|----------|--------|---------|---------|---------|--------|---------|---------|---------|
| 1 | Award of Contract | * | | | | | | | | | | | | | | | | |
| 2 | Meet with ACSRG | | | * | | | | | | | | | | | | | | |
| 3 | Prepare Communications Strategy | | | * | | | | | | | | | | | | | | |
| 4 | SWOT Analysis Existing Services | | | ↔ | | | | | | | | | | | | | | |
| 5 | Demographic Profiling | | ↔ | | | | | | | | | | | | | | | |
| 6 | Research on Alternative Models | | ↔ | | | | | | | | | | | | | | | |
| 7 | Community / Stakeholder Meeting | | | | | * | | | | | | | | | | | | |
| 8 | Legislative Compliance Review | | ↔ | | | | | | | | | | | | | | | |
| 9 | Report on Legislative Compliance | | | | | * | | | | | | | | | | | | |
| 10 | ACSRG Meeting | | | | | * | | | | | | | | | | | | |
| 11 | Expression of Interest for Alternative Providers | | | | | * | | | | | | | | | | | | |
| 12 | Closing Date Expression of Interest | | | | | | | * | | | | | | | | | | |
| 13 | Assess Expressions of Interest | | | | | | | ↔ | | | | | | | | | | |
| 14 | ACSRG / Stakeholder / Community Meetings | | | | | | | | * | | | | | | | | | |
| 15 | Submit draft Report | | | | | | | | | | | * | | | | | | |
| 16 | Submit Final Report | | | | | | | | | | | | | | | | * | |
| 17 | Prepare & Submit Positive Ageing Strategy | | | | | | | | | | | | | | | | | * |

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7. FEES & CHARGES

Fees quoted to complete the scope of work are \$39,000 (+GST) plus travel & accommodation costs as required. This price includes attendance at meetings with Shire of Donnybrook Balingup personnel, printing & binding of 2 copies (1 bound & 1 unbound) of the final report. The price quoted does not include the hiring of venues or catering costs for stakeholder / community meetings.

The following is a breakdown of the quoted fee and a breakdown of the amount of time each member of the team will contribute to the assignment

| Team Member | Allocation of Time | Cost |
|------------------------|--|----------|
| Anna Bonython | 70% | \$27,000 |
| Wendy Fleet | 15% | \$ 7,000 |
| Nick Petrie | 15% | \$ 5,000 |
| Travel & Accommodation | Accommodation & meals recouped @ non SES rate of reimbursement. Mileage @ \$0.78 per km | |

8.1 Payment Terms

The following payment terms excluding GST are requested, payable within 14 days of Invoice.

| Deliverable | Payment |
|--|--------------------|
| Commitment Fee on Acceptance of Quote | \$ 5,000.00 (+GST) |
| Completion of tasks 1 to 13 as per Section 6 | \$10,000.00 (+GST) |
| Submission of Draft Report | \$15,000.00 (+GST) |
| Submission of Final Report | \$ 9,000.00 (+GST) |

8. REFEREES

David Fenwick, CEO Amaroo Village – Phone: 0417 984 894 Email: DavidF@amaroovillage.com.au

Nadine White – Former CEO, Boab Health, Phone: 0417 795 424 *-Please advise prior to contacting*

Aged Care Services Review

Shire of Donnybrook-Balingup

September 2018





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Bob Lowther
Manager Aged Care Services
Shire of Donnybrook Balingup
DONNYBROOK WA 6239

September 2018

Dear Mr Lowther,

Proposal: Aged Care Services Review

Thank you for providing KPMG with the opportunity to respond to the Shire of Donnybrook Balingup's (the Shire) request for assistance in conducting an *Aged Care Services Review*. This document details our understanding of your requirements, our approach and availability, current capability, price, past experience and performance.

We are pleased to offer you a team with significant experience working in the aged care sector assisting providers to:

- **Conduct service planning for aged care facilities and services** – Our team features knowledgeable and skilled analysts with demonstrated experience in assisting aged care providers with service planning, including conducting demand, supply and competitor analysis, needs identification and service development and transformation planning
- **Assess viability, identify options and deliver operational improvements** – Our team has proven methodologies for assessing service viability, analysing options for strengthening operations and delivering on operational improvements. This includes consideration of governance and management options.

- **Asset sales and outsourcing** – While we understand that this engagement will not include any form of market sounding, asset sale or outsourcing of operational functions, we appreciate these are potential options for the Shire resulting from this review. We are able to leverage KPMG's extensive experience and experts to ensure our review provides the Shire with a practical and actionable report.

Our team has a deep understanding of:

- **The challenges of service delivery in Western Australia's regional, rural and remote communities** – Our team has a detailed understanding of the social and economic environments of our regional communities obtained through direct experience working with a wide range of rural and remote services.
- **The policy and service delivery context for aged care services** – Our team understands the overarching Federal and State policy context, including reform directions and the relevance of these to aged care providers including Local Government operators.

We are pleased to offer a proposal that outlines a sound methodology for undertaking the project, outlines our qualifications and experience, and provides a value for money offer.

We look forward to your response to our proposal and working with you to undertake this work. Please contact Stephen Morris on 0410 419 280 or myself on 0428 742 728 if there is anything you would like to discuss regarding our response.

Yours sincerely

Nicki Doyle
Partner

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Disclaimers

This proposal is made by KPMG, an Australian partnership and a member firm of the KPMG network of independent firms affiliated with KPMG International, a Swiss cooperative, and is in all respects subject to the negotiation, agreement, and signing of a specific engagement letter or contract. KPMG International provides no client services. No member firm has any authority to obligate or bind KPMG International or any other member firm vis-à-vis third parties, nor does KPMG International have any such authority to obligate or bind any member firm.

This proposal is prepared for the sole and exclusive use of the party or organisation to which it is addressed. Therefore, this document is considered proprietary to KPMG and may not be made available to anyone other than the addressee or person(s) within the addressee's organisation who are designated to evaluate or implement the proposal. KPMG proposals may be made available to other external persons or organisations only with the written permission of the Lead Partner submitting the proposal.





Our approach and availability

KPMG's approach will deliver the required outcomes

Aged Care Services Review

Our understanding

Context

For 45 years, the Shire has been involved in delivering a diverse range of aged care services. Until 2015, the Shire operated its aged care services and assets under an independent Board; however due to governance issues the services were brought into the Council structure and under a single portfolio. Difficulties have been experienced in managing the services appropriately and the portfolio is running at a loss.

Shire aged care services portfolio

The Shire's possesses a number of aged care services and assets within their portfolio including:

- 21 well-aged units (Minninup Cottages and Langley Villas)
- A 13 residence lease/loan retirement village (Preston Retirement Village)
- A 40-bed Residential Aged Care Facility (Tuia Lodge)
- A number of Shire-run cemeteries within the district.

Shire strategic community plan

The Strategic Community Plan is the Council's principal 10-year strategy and planning tool. This plan reflects the community's aspirations for the future of the Shire. Outcome three articulates the social objective of a 'Healthy, safe and inclusive community'. Of this subset, outcome 3.1 sees that services provided by the shire such as aged person accommodation, aged services and senior services are essential to the Shire. Specific reference is given to continuing to build 'an engaged, supportive and inclusive community', 'well-supported community groups and facilities' and 'a safe and healthy community environment for all ages'. Residents have expressed a desire for these outcomes and strategies to be further developed.

Reform and change

Recent aged care reforms have focussed on supporting older Australians to ageing in place, remain at home and independent for as long as possible, promote wellness and reablement, deliver individualised responses and enable dignity and choice.

Sector sustainability is a major issues as Australia's population ages, and recent reviews as well as the Royal Commission have highlighted the importance of a ongoing attention to quality, risk management and effective governance systems. Furthermore, as aged care consumers exercise choice and control over their services, there has been a renewed focus on customer service and experience to ensure service quality and viability.

These reforms are driving service providers across the country, including affected Local Government Authorities, have been reviewing their provision of aged care services to ensure they are in-step with any reform or change in the sector.

Our understanding of your requirements

The KPMG team understands that the Shire is seeking a review of their aged care services to be undertaken to assess and recommend:

- What services should be delivered
- What body or bodies are best suited to administer and deliver the operational requirements of those services.

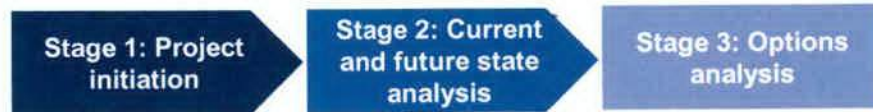
The review will also collect and consider evidence, and best practice models about how the Shire can best maintain, deliver and support the current service provisions - as well as advocating and lobbying for the inclusion of further facilities within the community.

Aged Care Services Review

Overview of our approach

Project overview

The review will consider the aged care services that should be delivered and what body or bodies are best suited to administer those services. In addressing the scope of this engagement KPMG proposes utilising a three-staged approach:



The key activities to be undertaken during each stage are discussed further in the following pages, in summary:

- During **Stage 1**, KPMG will hold a project initiation meeting with Shire representatives and prepare a project plan.
- During **Stage 2**, KPMG will assess the viability and operational challenges faced by the Shire's aged care services, review current governance and management arrangements, and analyse community needs. This will include a benchmarking process, SWOT analysis, document and financial review to assess the current state. Analysis of community needs will include demographic projections as well as consideration of needs such as social inclusion, community infrastructure, intergenerational supports, and access to age appropriate health services. Consideration will also be given to the availability of aged care services, including home and residential care providers in the region.
- During **Stage 3**, KPMG will prepare an options analysis for the aged care services delivered by the Shire. The options analysis will be a qualitative analysis of options for future ownership and management of the Shire's aged care services to ensure the community continues to have access to high quality, affordable and appropriate aged care services.

Aged Care Services Review

Stage 1. Project initiation

Project initiation

Prior to commencing the review, KPMG will convene a **project initiation meeting** at the commencement of the engagement.

The purpose of the project initiation meeting is to develop a clear and common understanding of the project approach, tour the facilities, clarify roles and responsibilities, and confirm all deliverables and the timing of activities. Items to be addressed during this phase include:

- The scope, key activities, milestones, deliverables and timeframes for the project
- Identification of documentation and data available to inform the review, and processes for submitting KPMG's data request
- Identification of any related communication protocols (and any sensitivities KPMG should be aware of)
- Project management / governance processes, including the roles and responsibilities of (and communication protocols between) the Shire's Project Manager and KPMG's Project Manager
- The process for responding to emerging issues / risks during the project, including the development of contingency plans.

Following the meeting, KPMG will prepare a short project plan confirming the agreed arrangements as discussed above.

| KPMG will deliver | Completed by |
|--------------------|--------------|
| Initiation meeting | 12 Oct 2018 |
| Data request | 12 Oct 2018 |
| Project plan | 19 Oct 2018 |

Aged Care Services Review

Stage 2. Current & future state analysis

Current state analysis

In Stage 2, KPMG visit the Shire and **prepare a current and future state analysis** specific to the Shire's aged care services, including:

- Review of the Shire's aged care service operation to assess viability as well as operational challenges relating to management, governance, quality, asset maintenance and refurbishment requirements, rostering efficiency, occupancy, Aged Care Funding Instrument (ACFI) management, fees collection and pricing
- Financial analysis which distinguishes between performing and under-performing assets and services
- Financial benchmarking against the Stewart Brown Aged Care Performance Survey
- Assessment of access to other aged care services in the region
- A SWOT analysis and interview process with Shire representatives
- Use of Australian Bureau of Statistics / South West Development Commission data to understand demographic projections
- Analysis of aged care needs inclusive of age-appropriate housing, home care and residential aged care and other relevant support services.

Additional analytical option

Note: As a separately costed option, the Shire may choose for KPMG to undertake interviews with three Local Government Authority operated aged care services. A focus of these interviews would be to understand the strengths and weaknesses in their governance models.

| KPMG will deliver | Completed by |
|--|--------------|
| Interviews with Shire representatives | 9 Nov 2018 |
| Desktop analysis addressing service viability and operations | 23 Nov 2018 |
| Demographic projections and needs analysis | 23 Nov 2018 |

Aged Care Services Review

Stage 3. Options analysis

Options analysis

During Stage 3, KPMG will undertake a process to **identify, scope and assess four options available** to the Shire for future management of their aged care services and assets. This will include:

- A scoping process which identifies four options for future management of Shire services and assets. For example, this may include options such as:
 - Retain under Shire management and improve performance
 - Retain under Shire ownership, re-establish independent Board
 - Outsource management of the services to an approved provider
 - Sale / transfer of assets to local providers
- A validation workshop with service managers and Shire representatives to present our initial findings, test and refine identified options
- A report will then be drafted and submitted to the Shire for feedback. Upon receiving feedback the report will be finalised. The final report will provide a synthesis of the analysis prepared to date. It will include an introduction, analysis of the current and future state, options analysis which states implications associated with each option, further considerations and recommendations going forward.

KPMG will then travel to Donnybrook to present the final report to both the Working Group and Council representatives.

| KPMG will deliver | Completed by |
|---|------------------|
| Workshop | 7 Dec 2018 |
| Draft final report | 14 Dec 2018 |
| Final report | 28 February 2018 |
| Presentation to Aged Care Reference Group | To be advised |
| Presentation to Council representatives | To be advised |



Aged Care Services Review Project timeline

| Stage 1: Project initiation (8 October – 19 October) | Stage 2: Current and future state analysis (22 October – 23 November) | Stage 3: Options analysis (3 December – 28 February 2018) |
|--|---|---|
| <ul style="list-style-type: none"> • Prior to commencing the review, KPMG will convene a project initiation meeting in Donnybrook with the Shire • Identification of documentation and data available to inform the review, and processes for submitting KPMG's data request • Development of a project plan which states the governance and management arrangements going forward. | <ul style="list-style-type: none"> • Documentation and financial review which considers operational and management issues and distinguishes between performing and under-performing assets and services • Market analysis of other providers and financial benchmarking against the Stewart Brown Aged Care Performance Survey • SWOT analysis and interview process with Shire representatives • Demographic projections to gauge the range of the range of population futures for the Shire • Analysis of aged care needs and other needs of an age-friendly community which allows ageing in place. | <ul style="list-style-type: none"> • A scoping process which identifies four options for future management of Shire services and assets • A validation workshop with service managers and Shire representatives to present our initial findings, test and refine identified options • Delivery of a draft report with one week for feedback before confirming the final report • Presentation to the Working Group and Council representatives. |
| Outputs | Outputs | Outputs |
| <ul style="list-style-type: none"> • Project initiation meeting (in Donnybrook) • Project plan | <ul style="list-style-type: none"> • Documentation and financial review • Market, benchmarking and SWOT analysis • Interviews with Shire representatives • Demographic projections and needs analysis | <ul style="list-style-type: none"> • Workshop • Draft report • Final report • Presentation to the Working Group • Presentation to Council representatives |



Current capability

KPMG has the capacity and capability to deliver

Aged Care Services Review

Our project team

Our project team brings the right mix of skills, experience and expertise to bring real value to the Shire. Our team is fully committed and available to work on this project.



Nicki Doyle
Project Partner, Policy,
Programs and Evaluation

Nicki is KPMG's lead partner in our national ageing practice. Nicki brings extensive experience within the ageing sector and will provide overall leadership and quality assurance for the project. She offers deep expertise on the spectrum of aged care programs and services and has extensive practical experience engaging with older people as consumers of aged care services, including special needs groups, which will ensure our Review is targeted and appropriate.

Nicki will be the Partner for the project, and will be responsible for overall project leadership and quality assurance.

Relevant skills: vast experience and expert knowledge in aged and community/home care, service options and planning, strategic and growth planning, review/evaluation of services and programs

Role: Nicki will lead the Engagement and will be responsible for the overall delivery, quality of deliverables and strategic oversight of the engagement.



Stephen Morris
Project Manager, Policy,
Programs and Evaluation

Steve is an Associate Director within our health, ageing and human services practice. He has an in-depth knowledge of the aged care sector and has worked with a broad range of stakeholders including government, service providers, researchers and community members. Steve's work has included performance measurement and operational improvement, strategic planning, governance, workforce planning, market and population analysis, change management and transformation. Steve's recent experience includes a range of aged care engagements across home care, residential and retirement settings.

Relevant skills: policy and program development, performance measurement and operational improvement, strategic planning, governance and workforce planning, change management and transformation

Role: Stephen will act as the day to day contact with the Shire. His other tasks include organising the KPMG project team for key tasks and being involved in all stages of the project, from initiation to final report writing.



Aged Care Services Review

Our project team

Our project team brings the right mix of skills, experience and expertise to bring real value to the Shire. Our team is fully committed and available to work on this project.



Ellery Blackman
Support for financial analysis,
Policy, Programs and Evaluation

Ellery has a strong background in preparing and reviewing financial reports for both the private and not-for-profit sector. He has worked on various engagements undertaking tasks such as budgeting, compliance, business development, providing commercial advice, and the development and implementation of management reporting systems.

Relevant skills: Options and financial analysis, business development, deep knowledge of internal business systems, experience working in regional and remote Western Australia

Role: Ellery will leverage his wealth of knowledge in reviewing financial reports to assist with the current and future state analysis. He will also use his reporting skills to support the options analysis.



James Hughes
Support for financial analysis,
Enterprise Advisory

James has worked closely with management in various health service organisations to provide support with an array of items, including but not limited to, management reporting, analysis of revenue streams, grant reporting, employee benefits analysis and expenditure reviews. James has also conducted business reviews involving extracting insights from detailed data collected over years for review and consideration.

Relevant skills: Management reporting, analysis of revenue streams, business reviews

Role: James will draw on his background of working closely with various health service organisations to assist with all stage of this engagement. He will use his strong analytical and reporting skills to support the benchmarking and SWOT analysis.



Past experience and performance

KPMG's commercial offer delivers outstanding value for money

Aged Care Services Review

Relevant experience

Retirement Village Feasibility Study, City of Canning

KPMG undertook a Retirement Village Feasibility Study with the City of Canning to assess:

- The possible short-term improvements to existing Retirement Village Facilities (in terms of physical buildings and/or the service model improvements)
- The feasibility of longer-term re-development of these sites and considered the feasibility of additional Retirement Village Facilities within the City, in view of the likely demand for such facilities by current and prospective residents.

This work involved:

- Transition planning for the existing villages
- Market analysis, which summarised key market and demographic trends within the catchment area e.g. that there will be continuing demand for aged care services
- Financial feasibility analysis, which detailed the feasibility of different arrangements e.g. leasing available land to an existing residential aged care provider

Similarities demonstrated:

- Demographic and needs analysis
- Future state analysis to identify gaps and opportunities
- Service planning including options analysis

Market analysis, viability assessment and growth analysis, residential aged care provider, commercial in confidence

KPMG was engaged by a Western Australia aged care provider to assess the viability of its residential aged care business and assist with development of its growth strategy. The work completed included a:

- Market analysis to assess demand, supply and key competitor characteristics
- Viability assessment to consider the financial and operating performance of the provider's current residential aged care portfolio
- Modelling to consider the potential financial performance of the providers residential aged care portfolio with an additional 200, 300 and 400 beds.

Following the engagement, the client purchased an aged care business consisting of five facilities. KPMG provided further assistance in relation to this acquisition, including conducting financial due diligence prior to its purchase, development of an approved aged care provider application, development of Aged Care Approvals Round applications to secure bed licences that would enable expansion of the portfolio, and assistance delivering a program to integration the newly acquired facilities into the existing business.

Similarities demonstrated:

- Market analysis including demand, supply and competitor analysis
- Viability analysis and strategic service planning
- Service acquisition and integration program management support

Aged Care Services Review

Relevant experience

Challenges and opportunities in delivering aged care services in remote regions, Department of Health

KPMG was engaged by the Department of Health to undertake qualitative research into the challenges and opportunities faced by aged care service providers delivering aged care services to clients in remote regions. This included undertaking site visits to understand key systemic and localised challenges they experience in delivering aged care services. Challenges experienced included adapting to My Aged Care processes, engaging with primary health care services in the area and addressing the aged care needs of all members of their local area. In undertaking this work KPMG:

- Prepared comprehensive case studies of the challenges facing providers of aged care services in 17 regional and remote locations
- Worked extensively with individuals from the Indigenous community as most providers were either Indigenous community controlled health services, or providers servicing predominantly Indigenous clients
- Completed a report with presented a thematic analysis of the challenges, service delivery barriers, identified impacts and lessons learnt including local innovations. Which informed the development of strategies and policy options to foster improved service delivery and sustainability across aged care services in remote Australia.

Similarities demonstrated:

- Analysis of the challenges facing remote aged care services, including consideration of issues relating to service management, entry and screening, eligibility and assessment, service delivery, workforce, funding and finance, quality and regulation, reporting and facilities and infrastructure.

Residential Aged Care Model of Development, Brightwater Care Group Limited

KPMG was engaged to assist Brightwater in defining a new model of care (MOC) for its residential aged care (RAC) business. In completing this work KPMG:

- Undertook a desktop review to identify and assess new and innovative service models, offerings and service features in the RAC market
- Conducted a current state analysis which established a detailed understanding of Brightwater's current MOC, including strengths, weaknesses, gaps, areas for improvement and other challenges
- Developed undertook consumer testing and refinement of the preliminary Brightwater future state RAC MOC.

This work ensured Brightwater had a clear view of their RAC MOC to drive future planning and development work in the business based on clear understanding trends and policy drivers in the market as well as their overall strategy. This included articulation of the design principles that will inform future developments.

Similarities demonstrated:

- An understanding of the needs of an age-friendly community and consumer expectations of residential aged care services
- Understanding of RAC operational requirements
- An ability to undertake an analysis of the current service environment
- Experience in defining and testing the future service environment



Aged Care Services Review

Relevant experience

Strategic Asset review, RSL Care

KPMG was engaged to conduct a detailed review of 42 property assets, inclusive of residential aged care and retirement villages, according to a tailored assessment framework which considered strategic alignment, commercial returns, industry changes, market characteristics and mission objectives. This included an:

- Identification and high-level assessment of strategic/development options for each property asset
- Prioritisation of assets (at a portfolio level) for more detailed consideration
- The development of a program of work to complete more detailed options analysis and implement portfolio level and facility level strategies/options.

Through this engagement KPMG demonstrated an understanding of the residential aged care and retirement village sectors, developing tools and templates to present complex information and findings in a clear and concise manner.

Similarities demonstrated:

- Portfolio level options analysis
- Cost-benefit analysis relating to asset options
- An understanding of financial and risk management implications inherent in making recommendations

Provision of Services to Yaandina Community Services Limited, Department of Health (current)

The Department of Health has engaged KPMG through the Remote and Aboriginal and Torres Strait Islander Aged Care Service Development Assistance Panel to provide support to Yaandina Community Services Limited to prepare a clinical governance manual, aged care policies, procedures and operations manuals to ensure that these are: current, consistent and aligned to the requirements of the new Aged Care Quality Standards; and reflective of the transition of the Home and Community Care programme in Western Australia to the CHSP.

For this project, KPMG has worked with Yaandina to review, update and implement:

- Policies and procedures to assist the aged care services to meet the requirements of the relevant aged care legislation and standards, including policies and procedures relating to clinical governance
- The home care packages and residential care operation manuals
- Site specific staff handbooks (residential facility and community centre).

KPMG is currently finalising the initial draft policies, and will conduct training for management and relevant staff to provide information on the updated policies, procedures; manuals and handbooks.

Similarities demonstrated:

- Understanding of regulatory, quality and accreditation requirements
- Experience working with regional aged care providers





Price

KPMG's commercial offer delivers outstanding value for money

Aged Care Services Review

Price

Price basis

Our professional fees quoted are a fixed price based on our previous experience with similar engagements. We have included an estimate for travel and accommodation expenses in the quotation of **\$80,238 (incl. GST) fixed fee**.

Price schedule

| Stage | Service | Fee (incl. GST) |
|-------|------------------------------------|-----------------|
| 1 | Project initiation | \$4,958 |
| 2 | Current and future state analysis | \$32,377 |
| 3 | Options analysis | \$41,935 |
| | Total (excl. disbursements) | \$79,270 |
| | Disbursements | \$968 |
| | Total fee | \$80,238 |

Assumptions

- Our fee is reliant on the timely provision of all required data and information from relevant stakeholders, in an appropriate format immediately following the commencement of the engagement, to support timely and efficient delivery.
- Our fee proposal assumes that we would seek to address one (1) round of consolidated feedback on the draft deliverables prior to final delivery.

Optional work

As mentioned on page 8 in stage 2, KPMG can undertake additional interviews and desktop analysis relating to the management models adopted by three Local Government Authority operated aged care services. A focus of these interviews would be to understand the strengths and weaknesses in their governance models. This option is not included in the above prices, and would be an additional \$14,100 (inc. GST).



Holding statement

KPMG's response is subject to review and negotiation of the final terms of agreement. If we are successful, we would appreciate the opportunity to discuss the items set out below:

| Issue | Background |
|------------------------------|---|
| Limitation of Liability | Our liability in relation to the performance of the services is limited by the relevant Chartered Accountants in Australia and New Zealand scheme, approved under Professional Standards legislation and the Treasury Legislation Amendment (Professional Standards) Act 2004 (Cth). Accordingly, our liability for our services (including for any indemnity) is limited in accordance with the relevant scheme. We are happy to provide a copy of the relevant scheme upon request. Where a scheme does not apply, we request our liability will be capped at an amount reflecting market practice for the services provided. |
| Proportionate Liability | Proportionate liability legislation provides an objective framework for allocating responsibility between concurrent wrongdoers and we consider it should apply in the context of professional services in accordance with its terms. We would request deletion of any clause seeking to exclude the operation of proportionate liability legislation |
| Retention of Work Papers | We retain our work papers, which are internal working documents created in the performance of the services, for quality assurance and risk management purposes. Our work papers ordinarily contain client confidential information. We agree to maintain the confidentiality of any such information |
| Insurances | We have comprehensive insurance policies in place which are appropriate for the provision of the services, the terms of which are commercially confidential. As such we are unable to agree to provisions which may require us to disclose the terms of our policies or any claims made under them. We would, however, be pleased to provide certificates of currency as evidence of our insurances |
| Distribution of Deliverables | As our deliverables will be provided for your benefit, they should not be distributed to any third party in any form (unless required by law) without our prior written consent. This would not apply to State, Territory or Federal Government Departments to the extent it is required to distribute deliverables to the relevant Minister or associated Departments |
| Intellectual Property | We would like to clarify that we will retain any modifications, enhancements or developments to our pre-existing intellectual property/background intellectual property. In addition, we will grant a license to you to use our pre-existing intellectual property/background intellectual property for uses reasonably anticipated by the agreement |





Team skills, experiences and qualifications

Aged Care Services Review Curriculum vitae



Name Nicki Doyle

Position Partner – Policy, Programs and Evaluations

Education

- Master of Public Health, University of Western Australia
- Bachelor of Science (Physiotherapy), Curtin University of Technology
- Churchill Fellowship – To investigate the development of hospital-substitution and early discharge allied health services

Experience Nicki is an experienced consultant, with extensive experience working with clients within the ageing and community sectors, including Commonwealth and State government jurisdictions, health services, for profit and not for profit organisations. Her key areas of interest are aged care, community care, sub-acute care and rehabilitation, out of hospital models of care, and primary care with a particular focus on chronic disease and palliative care. Nicki has a strong strategic and operational focus, and incorporates a clinical focus in to her engagements.

Relevant experience

- Department of Social Services – Primary care establishment analysis for residential and community aged care
- Anglicare NSW – Residential Growth Strategy
- Aged Care Provider – Facility review and business care
- Department of Health – Pilots for quality indicators in residential aged and home care
- Department of Health - Challenges and opportunities in delivering aged care services in remote regions
- Queensland Health – Health Practitioner service review for aged care
- Department of Health – Support to Yaandina Community Services Limited



Name Stephen Morris

Position Associate Director – Policy, Programs and Evaluations

Education

- Advanced Diploma of Business Management, University of New England
- Bachelor of Science, Australian National University
- Bachelor of Arts, Australian National University

Experience Steve brings an extensive array of knowledge of the aged care sector. His work has included policy, program and evaluation reviews; performance measurement and operational improvement; strategic planning; governance; workforce planning; market and population analysis; research; change management and transformation. Steve's recent experience includes a range of aged care engagements across home care, residential and retirement settings.

Relevant experience

- Department of Health - Challenges and opportunities in delivering aged care services in remote regions
- Department of Health – Support to Yaandina Community Services Limited
- Not For Profit Provider – Ageing In Place model review
- Brightwater Care Group Limited – Brightwater At Home Re-Engineering Program
- Not For Profit Provider – Residential aged care viability review and growth strategy
- Health Support Services WA – Operating Model and Performance Review

Aged Care Services Review Curriculum vitae



Name Ellery Blackman

Position Manager Policy, Programs and Evaluations

Education

- Bachelor of Commerce (Accounting and Finance), James Cook University
- Member of the Institute of Chartered Accountants Australian and New Zealand

Experience Ellery brings a wealth of knowledge in preparing and reviewing financial reports for both the private and not-for-profit sector. He has a strong understanding of budgeting and forecasting methodologies, and how facility operations drive financial success.

Relevant experience

- Prescribed Body Corporates, Aboriginal Health Services, Private entities (WA/QLD) – Compliance and Advisory Services
- Aboriginal Community Controlled Health Organisations (WA/QLD) – Data Quality Assessment
- Community Development Corporation (Palm Island) – Operations Review and Strategic Plan



Name James Hughes

Position Assistant Manager, Enterprise Advisory

Education

- Bachelor of Commerce (Investment finance and Financial accounting), University of Western Australia
- Member of the Institute of Chartered Accountants Australian and New Zealand

Experience James will utilise his knowledge in the broader public and not for profit sectors to bring different insights and assessments to the engagement. James has worked closely with management in various health service organisations to provide support with an array of items, including but not limited to, management reporting, analysis of revenue streams, grant reporting, employee benefits analysis and expenditure reviews.

Relevant experience

- Mawarnkarra Health Service – Assisting management with financial analysis and other needs
- Yindjibarndi Aboriginal Corporation – Assisting management with financial analysis and other needs
- Australian National University – Employee benefits analysis
- Confidential client (large private company) – Company 3 year data review and analysis
- Department of Treasury – Employee benefits analysis
- Department of Employment – Employee benefits analysis



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This proposal is made by KPMG, an Australian partnership and a member firm of the KPMG network of independent firms affiliated with KPMG International Cooperative ("KPMG International"), a Swiss entity, and is in all respects subject to the negotiation, agreement, and signing of a specific engagement letter or contract and the satisfactory completion of KPMG's internal risk assessment procedures. Should the results of our internal risk assessment not be satisfactory, KPMG reserves the right to withdraw this proposal. KPMG International provides no client services. No member firm has any authority to obligate or bind KPMG International or any other member firm vis-à-vis third parties, nor does KPMG International have any such authority to obligate or bind any member firm.

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SHIRE OF DONNYBROOK BALINGUP

REQUEST FOR QUOTATION (RFQ 198)

AGED CARE SERVICES REVIEW

SEPTEMBER 2018



KEY CONTACTS

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24 September 2018

Mr Bob Lowther
Manager - Aged Care Services
Shire of Donnybrook Balingup
49 Collins Street
Donnybrook 6239

Dear Sir,

Thank you for the opportunity to provide a consulting services proposal to the Shire of Donnybrook Balingup.

Ansell Strategic has been established to provide aged care and retirement living industry leaders and their organisations access to the most extensive network of the sector's professionals.

We believe we have the skills and experience to meet the needs of your project, having undertaken and assisted a large number of organisations with various elements of operational and management structure review projects for both residential aged care and retirement living throughout Australia and New Zealand.

- City of Kingston
- City of West Torrens
- City of Bayswater
- City of Rockingham
- Mary MacKillop
- Port Augusta City Council
- Hurtsville City Council
- City of Swan
- Georges River Council
- Brightwater Care Group

Please find enclosed our proposal to provide our services to you. We look forward to your feedback and hope that we are able to work with you on this project.

Yours sincerely,

A handwritten signature in black ink, appearing to read "Cam Ansell". The signature is fluid and cursive, with a large initial "C" and "A".

CAM ANSELL
MANAGING DIRECTOR

1. PROJECT OVERVIEW AND SCOPE

1.1 BACKGROUND

The town of Donnybrook is situated approximately 180 kilometres south of Perth in Western Australia's South West Region. The Donnybrook-Balingup Local Government Area comprises approximately 5,870 people, a significant portion of which are rapidly ageing.

The Shire of Donnybrook Balingup ("the Shire") currently operates the 40 bed residential aged care facility known as Tuia Lodge as well as 34 units across three retirement living developments known as Minninup Cottages, Langley Villas and Preston Retirement Village.

The Shire has shown an ongoing commitment to create an age friendly community by providing social inclusion, intergenerational connectedness and appropriate health services to the elderly population. The Shire is aware of the need to review its current aged care operations to ensure services continue to address the needs and preferences of the older community as the sector undergoes legislative reforms and other changes brought by the Federal Government. In particular, within the context of these changes the Shire is considering its future role in providing services, programs and facilities to older people post 2020.

1.2 PROJECT SCOPE

The Shire is seeking a diagnostic review of the aged care services currently on offer to the community.

The project would aim to review and evaluate the Shire's aged care services and will provide feedback on the ongoing viability of the business units individually as a whole. As outlined in the Request for Quotation (RFQ), the project would incorporate as a minimum:

- Undertake a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis on the present aged care services provided by the Shire;
- Consider the cost-benefit implications of the transfer of management from the Shire to a qualified aged care provider;
- Consider financial and risk management implications of any recommendations including short term and long term liabilities that will arise for the Shire with the current assets and services and identify if alternative options for either management or provision of these services by another entity or entities provides a more effective long term sustainable outcome;
- Compare the current quality of service provided to other service models of a similar scale including those operated by local government authorities; and
- Devise any other information deemed appropriate for the Shire to consider in regards to its aged care services.

Where applicable, Ansell Strategic will include information to support any recommendations or outcomes in relation to (but not limited to):

- Social inclusion, social and civic participation;
- Built environment, transport and housing including future proofing and specific needs analysis;

- Intergenerational community support and age appropriate health services;
- Demographic analysis including future projections/growth to 2045; and
- How any recommendations would be dealt within the context of changes to the My Aged Care system as well as federal funding reform.

Our methodology in undertaking this assignment is outlined in Section 2 of this proposal.

1.3 PROJECT TIMING

We are available to commence the project in early October as outlined within the RFQ and provided below.

| Date | Task | Parties |
|----------------------------------|---------------------------------|-------------|
| Monday 24 September 2018 | Submission of Written Quotation | ASPL |
| Friday 5 October 2018 | Contract Awarded | Shire |
| Monday 8 October 2018 | Engagement Letter Signed | Shire |
| Monday 31 December 2018 | Draft Report Provided | Shire |
| Thursday 28 February 2019 | Final Report Provided | ASPL |
| TBD | Presentation to Working Group | ASPL, Shire |
| TBD | Presentation to Council | ASPL, Shire |

It is important to highlight that the project timeframes are dependent on the timing and detail of information provided by you. We will work with you to ensure that the project is completed within the agreed timeframes.



PROPOSED METHODOLOGY

2. PROPOSED METHODOLOGY

2.1 PROJECT PLANNING AND REVIEW

Ansell Strategic will work with the Shire to confirm your expectations, milestones and project timing.

During the planning phase, we will request background information and review the Shire's previous reports and plans (if available).

2.2 REGULATORY ENVIRONMENT ANALYSIS

We will provide an overview of the historical regulatory environment and both recent and proposed regulatory changes to the aged care and retirement living sector.

This information will be used to assist in analysing how consumer expectations, funding and competitor dynamics will change and the effects of these changes to the Shire's aged care services.

2.3 DIAGNOSTIC REVIEW OF SERVICES

The Ansell Strategic Team will undertake a review and assessment of the Shire's aged care services. We will work with the Shire to critically evaluate the strengths, weaknesses and potential opportunities and threats of each service. The review will establish the current state of each service line and provide context to proposed options. The review will incorporate (but is not limited to):

- Evaluation of the service history, mix depth, flexibility, ability to meet the future demand of consumers and relevance to the target market;
- Assessment of staffing structures, capacity and practices;
- Rostering, allocations and staffing efficiencies;
- Government funding process and efficiencies;
 - Package and program analysis; and
 - Subsidy and supplement management
- Analysis of historic and forecast financial performance and earnings potential;
- Where applicable, benchmarking of services to other models of a similar scale including those provided under the governance of Local Government Authorities;
- Physical assessment of the building stock, infrastructure and equipment; and
- Market/competitor analysis (including planned developments in the catchment).

2.4 EVALUATION OF PROPOSED OPTIONS

Based on our review of aged care operations, we will provide options and/or strategies for the future of the Shire's services. The options will be presented with relevant historical experience, examples and take into account the proposed reforms so that the advantages, disadvantages and risks can be explored. Where possible, risk mitigations will be presented.

As requested by the Shire, proposed options will take into consideration elements such as (but not limited to):

- Financial and risk management implications including short term and long term liabilities that may arise for the Shire;
- Management or provision of these options by another entity;
- Social inclusion, social and civic participation;
- Built environment, transport and housing including future proofing and specific needs analysis;
- Intergenerational community support and age appropriate health services;
- Demographic analysis including future projects/growth to 2045; and
- How any recommendations would be dealt with in the context of changes to the My Aged Care system, federal funding reform and other sector changes.

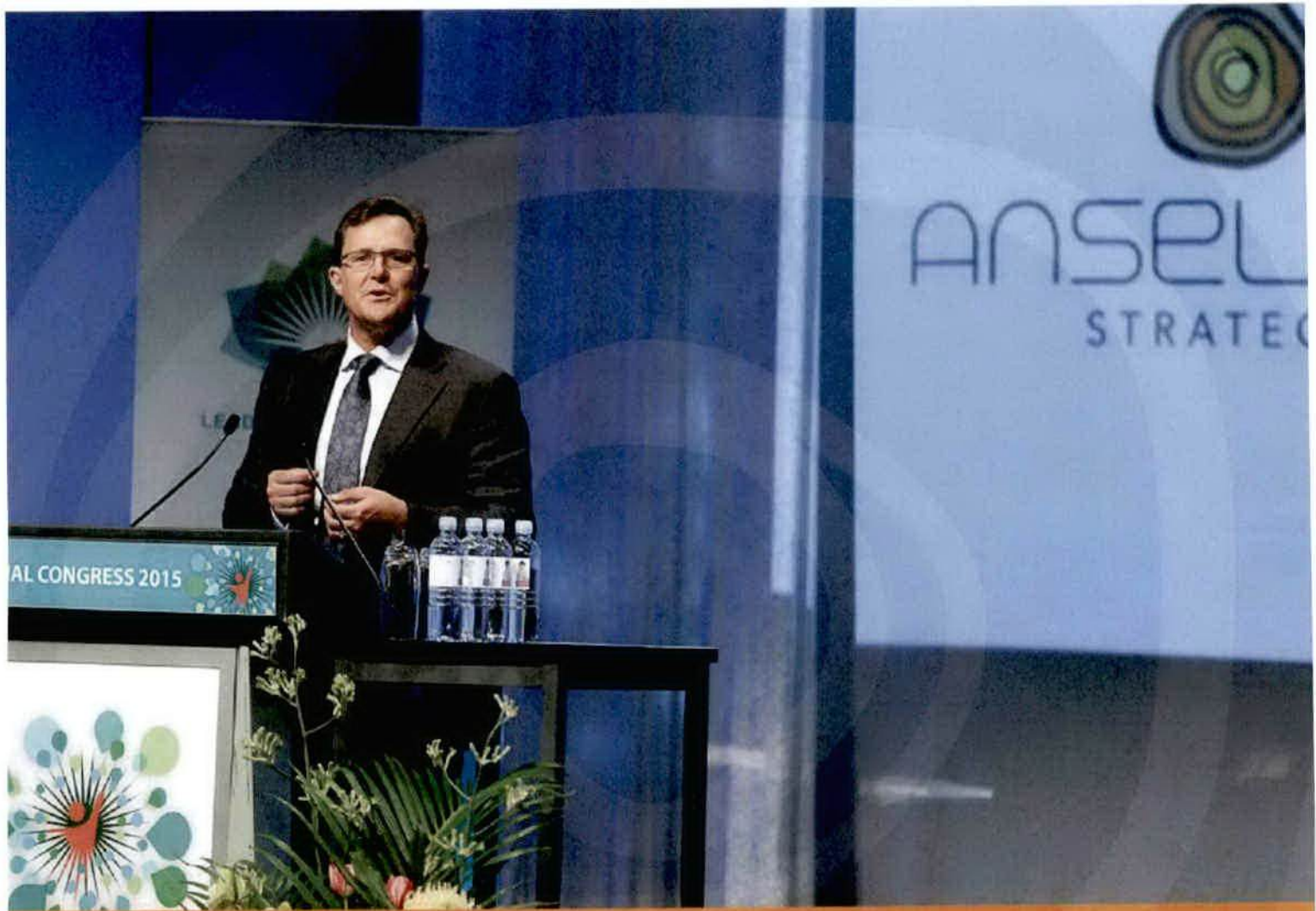
Evaluation of the proposed options will be undertaken in collaboration with the Shire's Working Group and Executive Team.

2.5 REPORT AND PRESENTATION

A draft report will be prepared based on our findings and analysis and recommendations. We will work with you to ensure that the report meets the specific objectives of the Shire.

A final report will then be prepared and issued to the Shire as well as a suitable summary copy of this report for the purpose of presentation at potential community consultation sessions.

As required, Cam Ansell and other Ansell Strategic staff are available to attend the proposed presentation to the Working Group as well as a presentation to Council.



OUR EXPERIENCE

3. OUR EXPERIENCE

Ansell Strategic was established to enable aged care industry leaders to leverage the sector's most extensive network of aged care professionals incorporating legal, property development, banking, architectural, management and clinical specialists.

With past experience in multi-national accounting and advisory firms, we recognised the need for a specialist service that focuses on the specific needs of aged and retirement living providers.

With additional experience in the management and operation of aged care organisations, we also recognise the importance of providing customised services that meet the mission, values and aims of individual organisations in the ever changing and increasingly competitive aged care sector.

Our team of full time staff work with industry specialists to deliver a comprehensive service that is tailored to the specific needs of each organisation.

We are now recognised as one of the most eminent aged care professional firms in Australia and New Zealand. Having led many significant research studies and transactions across Australasia, we have established ourselves as an industry authority.

3.1 LOCAL GOVERNMENT EXPERIENCE

In addition to the experience outlined elsewhere in our proposal, Cam Ansell has been providing aged care advice to local government agencies across Australia for over 20 years. The majority of that advice has been provided as Managing Director of Ansell Strategic and previously as National Head of Aged Care for Grant Thornton. Ansell Strategic have recently assisted government agencies with the following services:

- Education workshops and presentations to Councils and Executives on the reforms in aged care and the projected service models required for the future.
- Working with Council Executives to formulate strategies for their aged care and retirement living services;
- Research into the role of local government in the provision of aged care and the facilitation of development in their municipalities;
- Development planning for greenfield and brownfield projects; and
- Divestment of aged care assets on behalf of local government.

The following referees have agreed to be contacted in relation to the most recent work undertaken by Ansell Strategic:

| Referee | Project Overview | Contact Details |
|----------------------------|--|--|
| City of Bayswater | <ul style="list-style-type: none"> ▪ Operational and Financial review of City of Bayswater's aged care services ▪ Analysis of redevelopment options for major retirement living site ▪ Council education and strategy workshops | Carissa Bywater Director Finance & Corporate Services Ph: (08) 9272 0634 |
| City of Rockingham | <ul style="list-style-type: none"> ▪ Evaluation of retirement village service ▪ Assisted in finding a suitable provider to develop a site for aged care accommodation. | Dean Stoitis Senior Project Officer Ph: (08) 9528 0455 |
| City of South Perth | <ul style="list-style-type: none"> ▪ Strategic review of site development options for retirement living and aged care ▪ Council and executive education and strategy workshops | Colin Cameron Director Corporate Services Ph: (08) 9474 0794 |
| City of Swan | <ul style="list-style-type: none"> ▪ Strategic review of site development options for retirement living and aged care ▪ Council and executive education and strategy workshops | Kylie Cugini Manager, Business & Tourism Services Ph: (08) 9278 9612 |

3.2 BUSINESS DIAGNOSTICS AND BENCHMARKING

We have provided services to aged care providers, industry bodies, financiers and the Australian and New Zealand Governments at facility-specific, organisation-wide and national levels. Our client base includes most large for-profit and not-for-profit providers and many smaller community, family owned providers and has include a variety of reviews, including:

- Comprehensive care and service diagnostic reviews
- Financial reviews and benchmarking
- Performance analysis and benchmarking
- Corporate services assessments
- Culture assessments.



3.3 TURNAROUND STRATEGIES AND CHANGE MANAGEMENT

The change management process can be particularly challenging in an aged care business. Paramount to all stakeholders is the wellbeing of the clients that rely on the delivery of quality, reliable services.

Ansell Strategic provides financial, corporate, operational and clinical advisors to ensure that this balance can be achieved. Our registered nurses have practical experience in organisational management and our consultants and accountants have extensive direct experience working in aged care.

We have worked with a large number of providers on the development of strategies that either increase service provision, improve efficiencies or ensure that services are in line with organisational goals. These include:

- Organisational structure / head office restructuring
- Information systems, communication and reporting system implementation
- Revenue maximisation, including ACFI maximisation projects
- Roster efficiency and staffing reviews
- Strategy implementation
- Facility closure and relocations.

3.4 STRATEGIC PLANNING AND SERVICE DEVELOPMENT

Ansell Strategic undertake ad hoc and long term strategic planning projects with a large number of providers throughout Australasia. Strategic projects range from board and organisational projects to site based development and planning projects.

We have worked extensively in less regulated aged care/retirement living sectors overseas. This experience, coupled with our unparalleled local expertise, enables you to move forward with confidence in the more complex and competitive environment.

3.5 OPERATIONAL AND CLINICAL MANAGEMENT

Ansell Strategic have worked with a number of providers to provide short and medium term operational and clinical management services.

Our operations and clinical team have been involved in the management of aged care facilities during liquidation and periods of significant change, ensuring appropriate clinical governance and resident service. We have worked alongside new management teams to ensure appropriate training and support. We have also closed and relocated facilities.

3.6 MERGERS AND ACQUISITIONS

Ansell Strategic has extensive experience with expansion and rationalisation services for the for profit and not-for-profit sectors, having been involved in almost all aged care transactions over the past three years. Representing both owners and purchasers, Ansell Strategic's advisors are licenced real estate agents, ensuring our clients are represented by people who'd understand their business.



3.7 CAPITAL DEVELOPMENT ASSISTANCE

Ansell Strategic has provided capital development assistance to a large number of for-profit and not-for-profit organisations.

The Ansell Strategic Team has been instrumental in developing service models that deliver on consumer expectations and provider returns. This is facilitated through our network of architects, developers and planning consultants that understand the industry, but can think outside the box.

As experienced Chartered Accountants, Registered Nurses and recognised specialists in this field, Ansell Strategic is trusted by major financiers to build and review financial models for new developments and redevelopments.

Our operations team are involved in many design and commissioning committees, providing both point in time service reviews and ongoing assistance during the design and commissioning process.

3.8 PROFESSIONAL DEVELOPMENT AND THOUGHT LEADERSHIP

As leaders in the aged care industry, Ansell Strategic have been called upon to assist in the ongoing development and education of Boards and executive groups around Australia and New Zealand.

Cam Ansell is directly involved in aged care policy setting having been appointed a member of the expert panel for policy/productivity in aged care services. Cam was integral in the establishment of Australia's largest analysis of aged care that resulted in benchmarking of almost every aged care service provider in Australia. Cam remains the project lead of the New Zealand aged care benchmarking project and is a recognised speaker, having been invited to speak on contemporary aged care topics at national and international conferences.



PROJECT TEAM

4. OUR TEAM

Our proposed team is headed by Cam Ansell, who is responsible and the primary liaison for this project.

Other team members will be given some responsibility for different aspects of your engagement based on your requirements and their specialist skills. Our team has been recruited for specific roles and skillsets. All have unique experiences in aged care and retirement living that ensure their suitability in the role.

All team members have a strong understanding of the governance, statutory requirements and operations of aged care and retirement living. We are aware of our boundaries and will always work within regulatory and organisational frameworks. All field staff have current Police Clearances and statutory declarations on hand.



CAM ANSELL – MANAGING DIRECTOR

Background

Cam is a Chartered Accountant and Managing Director of Ansell Strategic.

With over 25 years of experience in the aged care and retirement living industries, Cam is a recognised thought leader in the sector.

Cam has undertaken comprehensive financial and operational reviews of retirement and aged care services in Australia, USA, Asia and New Zealand. He has lead major studies across Australia and New Zealand to advise Government and industry on financial viability and sustainability.

Cam has also performed detailed market metrics reviews to assist providers across Australia and New Zealand to identify market opportunities for capital development and redevelopment projects.

Cam has provided performance benchmarking analysis for most aged care providers in Australasia and is a recognised national and international speaker on the changing trends in seniors' accommodation and care services.

Cam has also personally managed aged care facilities and retirement villages.



Focus

- Mergers and acquisitions
- Strategic planning and service development
- Capital development planning
- Board and executive professional development

Qualifications

- Bachelor of Business (Edith Cowan University)
- Fellow, Institute of Chartered Accountants in Australia (ICAA)
- Fellow, Australian Institute of Company Directors (AICD)
- ASIC Registered Company Auditor

DANIEL LEE – MANAGER - ADVISORY

Background

Daniel has undertaken a large number of strategic and organisation diagnostic reviews of aged care and retirement living organisations, working with both not-for-profit and for-profit providers, government, peak bodies and a number of service providers.

He has contributed to the development of financial benchmarking tools and uses this data in his efficiency analysis work with providers.

Daniel has also undertaken financial modelling for aged care providers and health service, and risk and assurance reviews. Daniel plays an integral part in capital development projects through the identification of suitable sites, development and review of proposed service models, assessment of the project feasibility as well as project management.



Daniel is responsible for the management of market and competitor analysis, having undertaken a large number of reviews throughout Australia and New Zealand.

Daniel has been integral in the analysis of data in transactional projects and is responsible for the analysis of data, preparation of Information Memorandum documents, liaising with bidding parties and the management of data rooms. He has also been responsible for assisting in buy-side advisory services on behalf of aged care and retirement village operators.

Focus

- Financial analysis
- Feasibility and efficiency modelling
- Market and competitor analysis
- Mergers and acquisition data management

Qualifications

- Bachelor of Commerce and Economics (University of New South Wales)

AMBER CARTWRIGHT – MANAGER – ADVISORY

Background

Amber is a Chartered Accountant with previous experience in Public Accounting Practice and Commercial Project Accounting.

Amber has been responsible for the financial analysis and benchmarking of a number of aged care and community service providers across Australia and New Zealand.

She has also undertaken market feasibility analysis and financial modelling for potential residential aged care and retirement living developments.

Amber has been involved in a number of local and international diagnostic reviews and possesses experience in the review of operational effectiveness of organisations, appraisal of budgeting and financial reporting systems, systems documentation and process mapping.



Amber has been instrumental in piloting several research projects in collaboration with peak Australian aged care industry bodies, as outlined below:

- Delivering Home Care in Retirement Villages – A Guide for Operators with Property Council of Australia
- Research Report – Home Care in Retirement Villages with Property Council of Australia
- ACFI Review Report with Uniting Care Australia, Catholic Health Australia and Aged & Community Services Australia

Prior to Ansell Strategic, Amber has held roles as a Project Accountant at Chevron and an Experienced Analyst at Deloitte Touche Tohmatsu in the Audit & Advisory division where she was involved in the audit and other assurance engagements. During her time at Chevron, Amber was responsible for developing and implementing standardised financial reports also undertook cash flow forecasting and analysis on the Chevron Wheatstone Downstream Project. At Deloitte Touche Tohmatsu, Amber had experience working in multiple industries including aged care, mining, oil & gas, and the secondary education industry.

Focus

- Financial analysis
- Feasibility and efficiency modelling
- Market and competitor analysis
- Process mapping and improvement

Qualifications

- Bachelor of Commerce (University of Western Australia)
- Member, Institute of Chartered Accountants in Australia (ICAA)

JUDI COOMBE – MANAGER - OPERATIONS

Background

Judi has extensive experience in the aged care sector at both operational and senior management levels.

Judi is a Registered Nurse, having undertaken her initial training in New Zealand and having worked in various clinical roles in Australia and New Zealand.

In her most recent role as State Manager for Allity, Judi was responsible for the management of the organisation's South Australian business.

As the General Manager of Residential Care with ECH Inc., Judi managed 11 homes in South Australia and the Northern Territory and was a fundamental member of the executive team. Judi was integral in the sale and transition of the ECH residential care assets to Allity in 2013.



Judi has been responsible for a number of new development and re-organisation projects. Judi has also been integral in the implementation of new organisational strategies and culture systems.

Focus

- Operational strategy and management
- Clinical governance
- Change management
- Human resource management and culture development
- Capital development planning

Qualifications

- Master of Business Administration (University of South Australia)
- Master of Health Science – Health Service Management (University of South Australia)
- Registered Nurse (Hastings Memorial Hospital, New Zealand)

SARA AGOSTINELLI – SENIOR CONSULTANT

Background

Sara has a background in marketing and communications and has specialised in market research.

She has undertaken a number of qualitative and quantitative market reviews, including geographic and demographic population analyses and comprehensive research on existing and emerging competition for residential aged care facilities and retirement villages. Sara has performed market analyses for both not-for-profit and for-profit providers as well as private service providers.

Sara has experience in numerous transaction projects, assisting with the preparation of information memorandums and data room management. She has assisted both for-profit and not-for-profit providers in both divestments, acquisitions and development feasibility.



In addition, Sara is responsible for mapping market analyses geographically to be inclusive of all areas of interest surrounding the location of a site. Her research experience allows her to tailor an analysis to best suit the clients' needs.

Prior to Ansell Strategic, Sara held the role of Research Assistant at Thinkfield Intelligent Research, where she was involved in qualitative data collection, processing and reviewing for a number of private and public organisations. During her time at Thinkfield, Sara was predominantly responsible for the collection of qualitative data by conducting online and physical surveys, focus group interviews and data mining using the company's extensive database.

Focus

- Demographic and competitor analysis
- Heat mapping
- Survey construction
- Statistical data analysis

Qualifications

- Bachelor of Communication Studies (University of Western Australia)
- Master of Advanced Commerce (University of Western Australia)

ROSIE O'DOWD – ANALYST

Background

Rosie is an analyst at Ansell Strategic and possesses a diverse range of experience within the New Zealand and Australian aged care sector.

She has worked in a variety of roles within hospitals and rest homes including the development of marketing and sales strategies and hospitality service delivery initiatives. Rosie has also assisted in capital development projects for new aged care services.

Rosie assists with the review and benchmarking of financial information, analysis and compilation of detailed information memorandums and market analysis. She has undertaken geographic and demographic population analyses as well as research on existing and emerging competition for residential aged care facilities and retirement villages in Australia and New Zealand.



Combined with her practical experience within the industry, Rosie brings a pragmatic approach to address her client's objectives.

Focus

- Information memorandum compilation
- Market, Demographic and competitor analysis
- Data analysis

Qualifications

- Bachelor of Commerce (Victoria University of Wellington)

CHRISTOPHER WELBURN – ANALYST

Background

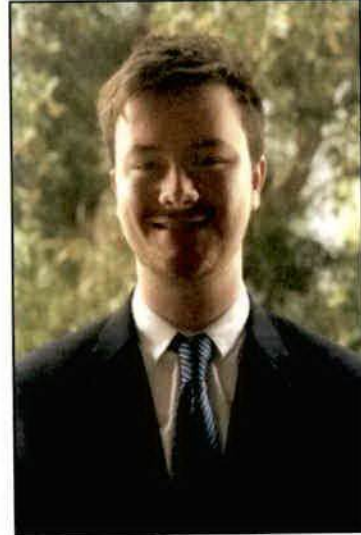
Christopher is an analyst at Ansell Strategic and has a background in finance and quantitative research.

He assists with the review of financial information, analysis and compilation of detailed information memorandums and market and demographic analysis.

He has undertaken geographic and demographic population analyses as well as research on existing and emerging competition for residential aged care facilities and retirement villages throughout Australia.

Christopher's key focuses involve assistance in compiling financial data and benchmarking to best practice as well as assistance in financial modelling, market analysis and preparation of information memorandums.

Christopher is able to offer a desirable background of research and financial analysis to his clients to ensure their goals are met.



Focus

- Financial analysis
- Market, demographic and competitor analysis
- Information memorandum compilation

Qualifications

- Bachelor of Commerce (Curtin University)



FEES



5. FEES

Based on our understanding of the nature of work required, we envisage our fees for the service to be approximately \$35,000 to \$40,000 (excl. GST).

Our fees are charged on an hourly basis at the following rates:

| Team Member | Role | Hourly Rate (AUD) |
|---------------------|----------------------|-------------------|
| Cam Ansell | Managing Director | \$580 |
| Daniel Lee | Manager - Advisory | \$375 |
| Amber Cartwright | Manager - Advisory | \$375 |
| Judi Coombe | Manager - Operations | \$375 |
| Sara Agostinelli | Senior Consultant | \$190 |
| Rosie O'Dowd | Analyst | \$150 |
| Christopher Welburn | Analyst | \$150 |

Any travel or accommodation expenses are charged at cost. Disbursements and other costs are not charged unless they fall outside of the scope of our agreement and are made at the specific request of the client.

Work conducted outside of the original scope will be conducted as a new engagement and charged at our published hourly rates.

6. NEXT STEPS

We look forward to working with you on this exciting project.

Once the scope of the project has been confirmed, we will forward you an engagement letter that outlines the specific terms of the engagement.

We will then forward you a request for a meeting and some preliminary background material that will assist us with the project.

ANSELL STRATEGIC

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